The Lynx Mailmerge Process

Revision 2.0

June 2014

Overview
The Lynx mailmerge facilities allow a template letter to be created and then sent to one or more recipients either by Email or post. All documents are created in PDF format, and then either presented on-screen for printing and posting, or sent directly to the recipient.

Letters can be created for either leads or customers. The process is the same, but the information available for automatic inclusion in letters is slightly different.

Mailmerge can be invoked from the lead or customer enquiry and can be used to generate a letter for a single recipient in this way. The process for this is the same as a general mailmerge, except that only one recipient will be presented in the letter generation screen.

In general, the mailmerge process follows a number of steps:

i) Creation of templates
ii) Selection of recipients
iii) Filtering recipients and selection of mailmerge parameters
iv) Generation of letters
v) Printing / transmission of letters

Each of these steps is detailed below.

Creation of Templates
Lynx allows creation of templates for letter creation in HTML format by using the Create HTML Template or Edit HTML Template programs. These are available on the Admin-> Mailmerge sub-menu.

Templates are divided into four types:

- Header Templates, which appear as the first element in a letter, and will usually contain a company letterhead. By default there is a header template called 'normal' which will be used for all letters.
- Footer Templates, which appear as the last element on each page of a letter, generally containing the company registered office details and VAT registration number. There is a default 'normal' footer template.
- Body templates which contain the core of the letters to be generated. These can include a number of mail-merge fields which are populated from the recipient information as the letter is generated
- Signature templates which are added to the letter after the Body Template information, and which can contain an image of a signature as well as contact information. Each user of the system should have their own signature template, the name of which defaults to the user's login ID.

To create or edit a template, use the Create Template or Edit Template program appropriately. In both cases, the template type and name must be specified or selected. Additionally, for body Templates, the recipient type must also be given. This is because the mail merge fields which will be filled in in each template as letters are generated could be different depending on the recipient type (for example customers may have an account balance, but leads do not – this list of fields will be expanded in the future).

HTML Content

The actual content of the template is in fact an HTML document, but knowledge of HTML is not required to edit the information as the screen provides a 'WYSIWYG' view of the HTML data so it can be edited much like using a word processor. It should be remembered, however, that the on-screen presentation of the HTML template is something of a compromise, and the final result may not look exactly as it did on screen when it was being edited.

In particular, care should be taken using cut and paste from other documents as the information that will be pasted may not be valid HTML. Copying and pasting from, say, a MS-Word document will result in a number of attributes being carried into the HTML that may cause later problems. In general, if you want to take information from another program and paste it into a Lynx template, you should paste it first into a simple text document (e.g. Notepad) and then copy and paste from there into Lynx.

Fonts are another possible area of difficulty, and 'exotic' fonts should be avoided as these will not generally be available on the server where the PDF letter will be generated. The safe fonts available are in the drop-down list on the editing toolbar. Others if used will appear on screen, but will be substituted with the closest equivalent when the PDF document is created.

The underlying HTML code can be viewed by clicking the 'Source' button on the left of the toolbar for the editing window. This is useful for refining the layout of documents.

Mail Merge Fields

The following mail merge fields are available for inclusion in Body Templates. All fields should be entered in the HTML with square brackets around them, e.g. [date]

Field name	Content	Leads	Customers
[date]	Today's date in dd/mm/yyyy format	✔	✔
[custom]	The contents of the custom field entered as a parameter before letters are generated. This allows a standard letter template to be created and then modified for a specific purpose	✔	✔
[name]	The name for the recipient account (company name if present)	✔	✔
[contact]	The name of the contact for the account	✔	✔
[salutation]	The contact salutation (defaults to the contact name)	✔	✔
[address_block]	The address of the recipient, formatted to remove blanks	✔	✔
[signature]	The signature block	✔	✔
[page]	A page break	✔	✔

Including Images

HTML templates can include images, but creating these requires a couple of steps.

First, the image to be used must be uploaded to the Lynx server. This is done using the 'Logo Gallery' function on the Admin->mailmerge menu. To add an image to the gallery, click on the 'Add Logo' button which will bring up a pop-up window. You can then navigate to the image file to be uploaded using the 'Browse' button and select it to upload to the server.

Once the image is in the gallery, you can include it in your HTML template: Click on the 'Insert/Edit' button on the toolbar on HTML template screen ( ) and enter the URL in the pop-up box that appears. The URL will be /*system*/logos/*filename*, where *system* is the unique part of the URL for your Lynx system and *filename* is the name of the image file you uploaded, with the extension, for example '/tfashford/logos/my_logo.jpg'.

Selection of Recipients

The first step in running a mailmerge is to select the recipients required. To make this easier, recipients can be selected using the kinds of criteria you will typically want to use in creating mailings – lead type, postcode and so-on.

To start a mailmerge, select the Mailmerge program from the Reports menu. You will first need to select the type of recipient (Leads or Customers). The screen will then refresh and give you more choices.

Leads can be selected using the home location, the type of lead (domestic, trade etc.), the type of product in which they have expressed interest, the source of the lead, the account manager and postcode. The first three criteria require selection from the drop-down lists displayed. You can select multiple criteria in the product type drop-down by holding down the control key as you click the selection. Postcodes can be entered in full or in part, for example 'N13' or 'N13 4' and multiple postcodes can be specified by entering a comma-separated list – for example 'EN1,EN2 8, EN3'

The selection for customers allows just location, account manager and postcode criteria.

When criteria have been entered, click the 'Generate' button to create the list of recipients and present the mailmerge parameter / filtering screen.

Filtering recipients and selection of mailmerge parameters

The next screen in the mailmerge process has two tabs on it, for the general parameters for the mailmerge and the selection of recipients respectively.

Mailmerge Parameters

The general parameters tab first allows you to enter a subject for your generated letters, and a category under which they should be filed. These fields are used to identify attachments on the lead and customer enquiry once the documents have been generated and attached to the recipient. The subject field is also used as the subject of email messages sent from the merge.

Next, you can select the templates to be used for the letters. The main one to focus on is the Template Body drop down, as this is the template that will be used to generate the letters. The signature template will default to your own, but you can pick someone else's signature or alternatively a different version of your own signature block if you have created a template of type signature for the purpose. The header and footer will default to the 'normal' templates, but these can be modified if you have created an alternative header or footer.

Lynx allows you to attach a PDF file to every generated letter, which is useful for flyers and the like. To attach a file, simply click the 'browse' button next to the PDF attachment file name field, and navigate to the file you want to attach on your computer, clicking or double-clicking to select it depending on your browser / operating system.

The custom text field can also be entered if you want to customize the content of the letter(s) to be generated. The content of this field will be substituted in where the [custom] mailmerge field appears in the template. The field format is HTML and can be edited in the same way as the HTML templates, though the number of options available on the editing toolbar is reduced.

If at any time you would like to see a preview of the generated letters, click on the image on the right hand side of the screen. After a couple of seconds, a preview image will appear of a merged letter using the parameters you have selected. You must select the Body Template and check at least one recipient before you can do this.

Finally, you can select how letters are to be sent with the 'Send By' field. By default, letters will be sent by post only, however you can check the 'Email or Post' option to select transmission by Email where an email address exists for a recipient, failing which a PDF will be generated for posting to them. Alternatively, you can check the 'Download Addresses Only' option to receive the name and address output as an Excel file. If this option is selected, no other information need be provided on the Main Paramaters tab – the selection of recipients (below) will still apply, however.

Mailmerge Recipients

On the recipients tab you will see displayed all the (potential) recipients for the mailmerge. All the recipients who have a tick next to them will receive the mailing, those without a tick will be ignored.

Note that if you have a long list of recipients that clicking on the Recipients tab may take a few seconds to populate the list. This is particularly true on slow internet connections.

The tick boxes can be used entirely manually to select or deselect recipients, however the 'Select Only' buttons and 'Select All' checkbox can be used to filter the recipients down quickly. Clicking on the 'Email Recipients' button will select only recipients for whom we have an email address. The 'Non-Email Recipients' button will select just those for whom there is NO email address. The 'Select All' button will either select or deselect every name on the list.

When you are happy with the parameters and recipient selection, click the 'Generate' button. This will then take you to the letter generation screen, or create the Excel-format name and address list, which you will then be invited to download.

Generation of Letters

The process of generating letters can take between a couple of seconds and several minutes depending on how many recipients have been selected and the complexity of the letter templates. As each letter is generated, a progress bar will show you how far through the list of recipients the process has progressed. An info box will show you the names of recipients processed.

When generation is complete, a confirmation message is displayed. At this point, all the PDF files have been generated and stored, and a list of unsent letters has been created. Note that nothing will have been attached to the recipient record.

One or two buttons will then be shown on the screen, which allow you to view a merged PDF of all items to be posted or to send the messages requiring transmission by email.

Printing / transmission of letters

Clicking on the 'Show Post' or 'Send Email' buttons will bring up a pop-up screen that will start the process of attaching and merging the postal letters or sending the Email messages.

The 'Show Post' option will create a merged PDF of all the letters to be sent by post, and you will then be invited to download/display this file for printing. As the merge progresses, the individual letters are attached to the recipient record. Finally, click on the close button to shut the pop-up window.

The 'Send Email' button operates in a similar way, except that letters will be sent by Email as they are attached.

Management of Mailings

If you do not immediately merge postal letters or send email letters, these will be retained on the Lynx server until you are ready to send them.

The 'Manage Mailings' program allows you to see batches of letters awaiting transmission and to initiate the merge/attach/display of postal letters or attach/send process for email letters. Alternatively, you can delete a batch of generated letters from the system.